



Community Marketing, Inc.

LGBT Market Research +
Development Lab

Rivendell
the gay media company!

CMI Gay Consumer Index® USA Gay Male Abstract 2007 n=12,044

CMI's *Gay Consumer Index*™ study is the largest, most comprehensive, and most representative consumer study of its kind in history. The report is produced and published by Community Marketing, Inc., (CMI) in collaboration with Rivendell Media. Community Marketing, established in 1992, is proudly gay-owned and -operated, and we conduct our own research.

The focus of CMI's *Gay Consumer Index*™ is to profile gay male consumer preferences, attitudes, spending patterns, behaviors, and motivations regarding a wide variety of topics, including: credit cards, automobiles, electronics, entertainment, social activities, politics, and television and print media. The study identifies the unique preferences and motivations not only by gender/orientation (i.e. gay or lesbian), but also by age cohorts. In addition, comparisons to findings for mainstream (heterosexual) adults are included throughout. The full report is rich with market data, insights, historical and trend perspectives.

12,044 respondents who identified themselves as gay men and reside in the United States completed this survey in the 34 day period from April 13, 2007 through May 16, 2007. Respondents were sourced through Community Marketing's proprietary survey pool and through partnerships with over 75 LGBT (lesbian, gay, bisexual, transgender) magazines, newspapers, websites and event organizers throughout the United States. To encourage completion of the survey, respondents were offered an incentive to win one of four travel vouchers good for travel in North America (value estimated at \$500 each). Survey respondents totalled over 25,000, and a parallel *Lesbian Consumer Index*™ (n=10,380) report has also been published, representing US lesbian consumers. This year's study was sponsored by ABSOLUT.®

The methodology employed polls consumers representing the target audience who can be reached using LGBT print and Internet distribution resources. It should be kept in mind that the findings derive from those who identify openly as gay, and read gay publications and/or websites. These results should not necessarily be extrapolated to the entire gay male population; however, report findings do provide guidance regarding the perceptions and opinions of "out" gay men who can be reached by marketers through gay websites and publications.

Following are key findings derived from the full 100+ page report:

Respondent demographics

Median age: 45

- 10% under 30
- 17% over 55

46% are in relationships and living together, and 43% are single.

5% have children under age 18 living in home.

61% have a pet; 28% a cat and 38% a dog

Occupation

- Work in the Medical / Health Industry: 8%
- Work in Education: 6%
- Work in Legal/Government: 6%
- Retired: 7%

Home ownership

- 61% own residence
- 36% rent residence

Income

Median annual household income: \$83,000

- Singles \$62,000
- Couples living together \$130,000

Representative cross-section:

Respondents are well distributed throughout the United States, with the largest percentages residing in California, New York, Texas, Florida, and New England.

Continued on next page...

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What gay men do with their time

- Spend 12 hours per week of personal time (not work) on the Internet.
- 95% made purchases on the internet in the last year, and 81% use the internet for banking and bill paying.
- Watch TV for 10 hours per week. US gay men show the most likelihood of watching the major networks: NBC, ABC, CBS and Fox, followed by cable channels Bravo and gay-focused Logo.

Active in politics and community

- 84% voted in the 2006 mid-term election
- 92% voted in the 2004 Presidential election
- 40% contributed to a political party in the last year
- 24% attend a community fundraising event monthly
- 36% believe political leaders should "Continue the fight for gay and lesbian marriage equality. It should be a priority."

Communications

- US gay men are most likely to read national gay-specific publications and local gay publications, and mainstream publications that cater to a specific topic.

Social and entertainment

- 88% go out to dinner with friends at least monthly
- 72% of respondents consume at least one alcoholic beverage per week at a bar or restaurant. The median number consumed by those who have at least one drink is 4 drinks.
- 66% go shopping at brick and mortar stores at least monthly
- 63% go to see a movie at least monthly
- 53% work out in a gym at least monthly
- 50% go to a club or bar at least monthly
- 39% attend live theater at least monthly
- 24% attend a music concert at least monthly
- 24% visit a museum at least monthly
- 22% visit the beach at least monthly
- 20% go dancing at least monthly
- 13% attend a live sporting event at least monthly

Psychographics and motivations

- 89% are more likely to support companies with favorable LGBT employment practices.
- 88% are more likely to support companies that sponsor LGBT events and fundraisers.
- 85% consider advertising in LGBT publications to be a favorable motivator to purchase.
- 77% believe that increasing corporate recognition of the "buying power" of the LGBT community has been advantageous in advancing LGBT causes... *but* 73% believe that homosexuality will still be a divisive issue in the US in 10 years.
- 60% prefer that marketers refer to the "community" as "Gay & Lesbian" in their communications.

Purchases: How gay men spend their money

- 80% purchased with a Visa credit card in the last month
- The median US gay male respondent spent \$5,200 dining out in the last year, with a median of 4 times per week and a median of one of those in a fine dining establishment.
- Downloaded music or video from the internet: 46% purchased in the last year
- Cell Phone: 37% purchased in the last year
- Home computer or laptop: 30% purchased in the last year
- MP3 player (e.g. iPod, Creative, etc.): 26% purchased in the last year
- Digital camera or video recorder: 21% purchased in the last year
- HD or plasma TV: 20% purchased in the last year
- Video recorder/DVR (such as TiVo): 17% purchased in the last year
- Satellite Radio: 11% purchased in the last year
- PDA (e.g. Palm, Blackberry, etc.): 10% purchased in the last year
- Travel: median \$2,000 per year
- 25% consulted a retail travel agent in the last year
- Clothing: median \$500 per year
- Coffee drinks: median \$260 per year
- Bottled water & sports drinks: median \$260 per year

Automobile ownership

- 88% own an automobile
 - Own an SUV: 31%
 - Own a mid-size car: 27%
 - Own a luxury car: 21%
 - Own an economy car: 21%
 - Own a truck: 14%
- Length of ownership of automobile: 5+ years
- Motivated by purchase price: 52%
- Motivated by fuel efficiency: 38%
- Motivated by model's reliability: 34%
- 4% said they purchase a new car at least every two years
- Those who purchase a new car every two years are less concerned about fuel efficiency, and more concerned about safety features

Health, Fitness and Retirement

- 30% got a massage in the last month
- 16% went to a spa in the last month
- 65% take a daily vitamin supplement
- 92% know their HIV status
- 11% of respondents born between 1950 and 1969 indicate they would move to a LGBT retirement community when they retire.

Additional data, plus comparisons, observations, trends, commentaries and recommendations are found in the full report.

Please visit www.CommunityMarketingInc.com for more information about the *Gay Consumer Index*[™], and to order the full report. Also available is the parallel *Lesbian Consumer Index*[™] study of US lesbian consumers. Full reports contain data, graphics, analysis, observations, comparisons, commentaries from community leaders, and practical recommendations based on Community Marketing's 16 years of market research and client services leadership in this dynamic market segment. Community Marketing also offers Cross-Tab reports derived from the *Gay Consumer Index*[™], and provides custom survey, focus group and field study services.



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CMI's Gay Consumer Index was updated in November 2008 to include results from CMI's 2nd Annual LGBT Consumer Index study, sponsored by ABSOLUT® and Bridgestone.® The 2008 update study gathered over 20,400 completed responses via over 100 media, event and community partners. This abstract represents 11,000 American gay men.

Purchases in the last 12 months:

Gay men have ramped up their technology purchasing...

- 62% bought a cell phone or PDA, up from 47% in the 2007 study
- 43% bought a personal computer, up from 30% in the 2007 study
- 37% bought stocks, bonds or mutual funds
- 33% bought a high definition TV, up from 20% in the 2007 study
- 25% bought an automobile
- 11% bought gold/precious metals/gemstones
- 8% bought a primary residence
- 5% bought a vacation home

Personal time online:

- 29% Email
- 18% Read or do research
- 14% Chat or visit social/dating sites
- 9% View video or video websites
- 8% Pay bills or check balances
- 7% Download or listen to music
- 7% Shop
- 3% Play online video games or gaming

Gay men spend twice as much time as lesbians on chat/social and dating sites and watching videos while lesbians play online video games twice as much.

Along with the increase in technology purchases, gay men are spending 58% more personal time on the internet: 19 hours/week vs. 12 hrs/wk in 2007. Those high-def TVs may be influencing hours spent watching TV, which increased 40% to 14 hours/week, from 10/week in 2007. This compares to 12 hours/week spent listening to music and 8 hours/week reading.

Discrimination in the Workplace

More than 3 of 4 gay men (78%) have never encountered any form of discrimination in the workplace.

Average rating of 8 (on scale of 1 – 10) for employers that are LGBT-friendly. Gay men may be choosing to work for companies that rate highly on scores for LGBT equality, or that provide a gay-positive environment for employees.

Influencers on decisions to do business with a company:

- 92% general (mainstream) market advertising that demonstrates diversity and inclusion
- 91% sponsorship of LGBT events / charities (up 3 percentage points over 2007)
- 90% advertising in LGBT media
- 89% employment policies
- 87% advertising on LGBT websites

Dining and drinking are important:

- \$97 / week: restaurants (mean)
- \$40 / week: bars / alcohol (median of 4 drinks/week)
- 51% dine with friends at least weekly
- 28% go to a bar or club weekly

Gay men report drinking twice as many drinks as lesbians.

Popular drinks (frequency of consumption 1-3, on 1-7 scale) include:

- 57% vodka
- 52% wine
- 49% beer

What gay men prefer their Community to be called...

Gay men prefer that the community be addressed with the term, "gay and lesbian" (45% rated the term 7 on a scale of 1-7), followed by "GLBT" (31%) and "gay man / men" (31%).

87% voted in the last 12 months

Most important issues influencing voting (% rating 1, on a 1-5 scale):

- 73% plans to strengthen the economy
- 70% ending the Iraq War
- 69% legalizing gay marriage
- 62% universal health care
- 60% protecting the environment
- 47% education

Issues that do not resonate:

- 24% tightening immigration laws
- 24% increasing national security
- 32% cutting taxes
- 37% increasing gun control

Gay men view the issue of education with less importance than lesbians (47% vs. 58%). This relates to gay men being far less likely than lesbians to have children in their households. The four issues of least concern to gay men closely mirror those ranked by lesbians.

The chief “mainstream” means of political polling, telephone surveys, are unlikely to reach gay men who take online surveys.

- 57% said it is very unlikely they would participate in a telephone survey, versus only
- 3% who said it is very unlikely they would participate in an online survey.

Gay men will enjoy numerous income streams during in retirement:

Percent who make regular contributions to:

- 67% Social security
- 55% Savings account
- 47% Company-sponsored 401k
- 33% Stock investments
- 36% IRA contributions
- 27% Real estate investments
- 21% Traditional pension plan

Charitable Contributions

- 22% gave more than \$1,000 to charity in the last 12 months.
- 10% gave more than \$1,000 to a LGBT-specific charity(ies).

Occupation

Although the occupations of gay men are widely distributed across all sectors of the economy, half have attained high positions in their fields:

- 25% manager or supervisor
- 13% senior management
- 11% owner / officer

Additional data, plus comparisons, observations, trends, commentaries and recommendations are found in the full report.

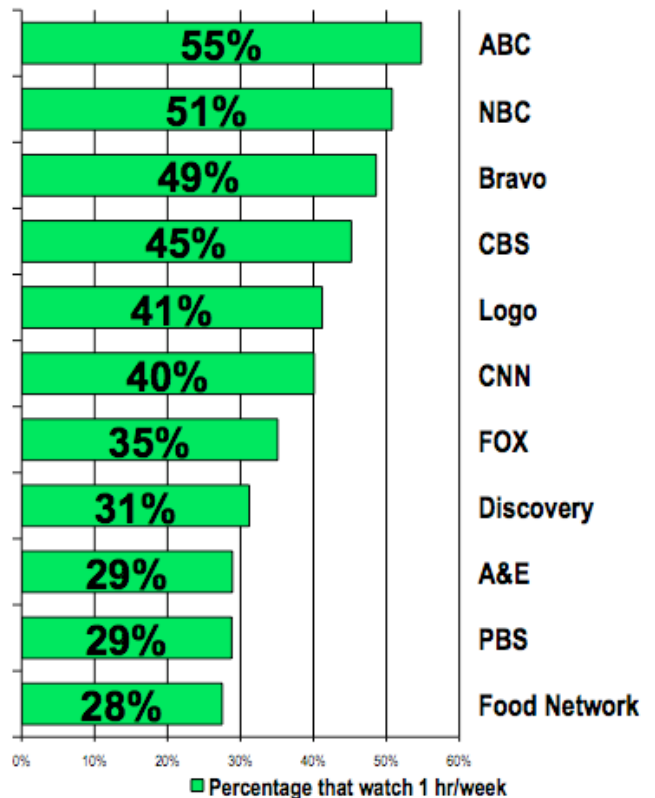
Purchases and investments:

Have you purchased any of the following in the last twelve months? Please mark all that apply.

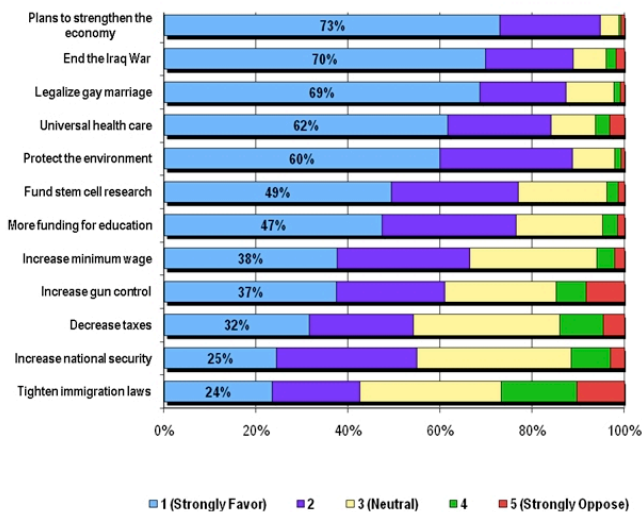
	Have you purchased any of the following in the last twelve months?
Cellular Phone (including PDAs)	62.3%
Personal Computer or Laptop (for home use)	43.4%
Stocks, bonds or mutual funds	37.1%
High Definition TV	33.2%
Automobile	25.0%
Gold or other precious metals or gemstones	10.7%
Primary Residence (home, condo, etc.)	8.3%
Television (other than High Def)	7.5%
Vacation home or other non-primary residential real estate	4.8%

Television consumption:

Favorite TV Channels



Voting issues of importance:



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